CADDIS CONNECTION
California Developmental Disabilities Information System

www.dds.ca.gov/caddis

March 2003 Newsletter

Department of Developmental Services

CADDIS Project Contacts:

CADDIS Program Manager
   Becky Pipoly
   (916) 654-3625
   bpipoly@dds.ca.gov

CADDIS Training & Forum
   Coordinator
   Tamara Wheeler
   (916) 654-1855
   twheeler@dds.ca.gov

CADDIS Project Manager
   Cheryl Hotaling
   (916) 654-2138
   cheryl.hotaling@dds.ca.gov

Email General Questions and
Comments to:
caddis@dds.ca.gov

CADDIS Forum 2002

According to the comments and surveys completed by the attendees, the CADDIS Forum 2002 was a success! The majority of respondents felt it was informative and valuable. The presenters did a wonderful job disseminating the information and answering questions. Much enthusiasm for the upcoming CADDIS implementation was elicited as a result. What was the main, recurring complaint about the Forum? You could not read the screen during the opening session demonstration of ShareCare. We hear you loud and clear. Lesson learned – next time, set up more screens throughout the room!

Here are the numbers from the Forum:
   Total attendance (including presenters and staff) : 301
   Total Regional Center attendance: 267
   Total evaluations returned: 97   Evaluation return rate: 32%
Approximate attendance per track:
   Service Coordination: 57
   Fiscal: 57
   Resource Development: 49
   IT/Technical Reporting: 53
   Management/Training: 62

We at DDS and Deloitte Consulting would like to thank everyone who attended and participated at the CADDIS Forum 2002. We look forward to working with you during the training and implementation portion of the project.

Committee's Corner

A key component of the CADDIS Project is ensuring that the Project meets system requirements; manages project scope, schedule and budget appropriately; and operates as effectively and efficiently as possible. A standard industry "best practice" is to employ independent oversight services for major Information Technology projects. DDS hired Gartner, Inc. to act as the "independent oversight" for the CADDIS Project. A key part of Gartner's oversight role is performing a quarterly "Project Health Check," which involves reviewing project deliverables and interviewing key project stakeholders and participants to assess how well the project functions, what risks the project may face, and what improvement strategies the project should pursue.

Gartner completed the baseline Project Health Check in December 2002 and found that the CADDIS project is generally operating very well. The CADDIS Project Team is very dedicated and has generated support for the new system across regional centers and DDS. Some of the notable areas at this early stage in the project include:

- *High level of involvement of the Steering Committee and regional centers, especially during the CADDIS 2002 Forum .*

- *Experienced project management and well-defined processes*

While the project is functioning pretty smoothly, a few areas of risk were identified that require additional analysis by the CADDIS Project Team. The CADDIS Project Team is currently performing this analysis, and these items will be reviewed by Gartner as part of the next quarterly Project Health Check.
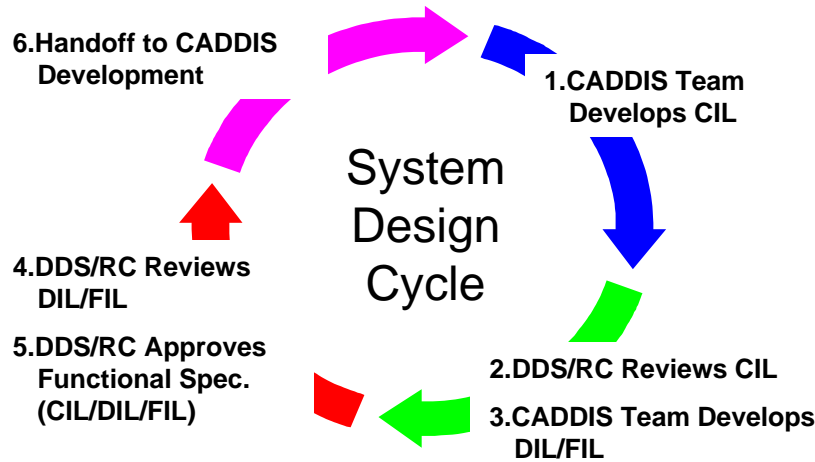
Jim Obermaier, Gartner

System Design is Underway!

CADDIS System Design began in earnest in late January with System Design orientation sessions for DDS and regional center subject matter experts (SMEs). This is the phase of the project where the functionality required for CADDIS is specified in the screens that the users will see (the Client Interface Layer, or CIL), the data that the system will store and display (the Data Interface Layer, or DIL), and the processing that will occur within the CADDIS application (the Functional Interface Layer, or FIL). There are a total of 149 Functional Specifications for CADDIS.
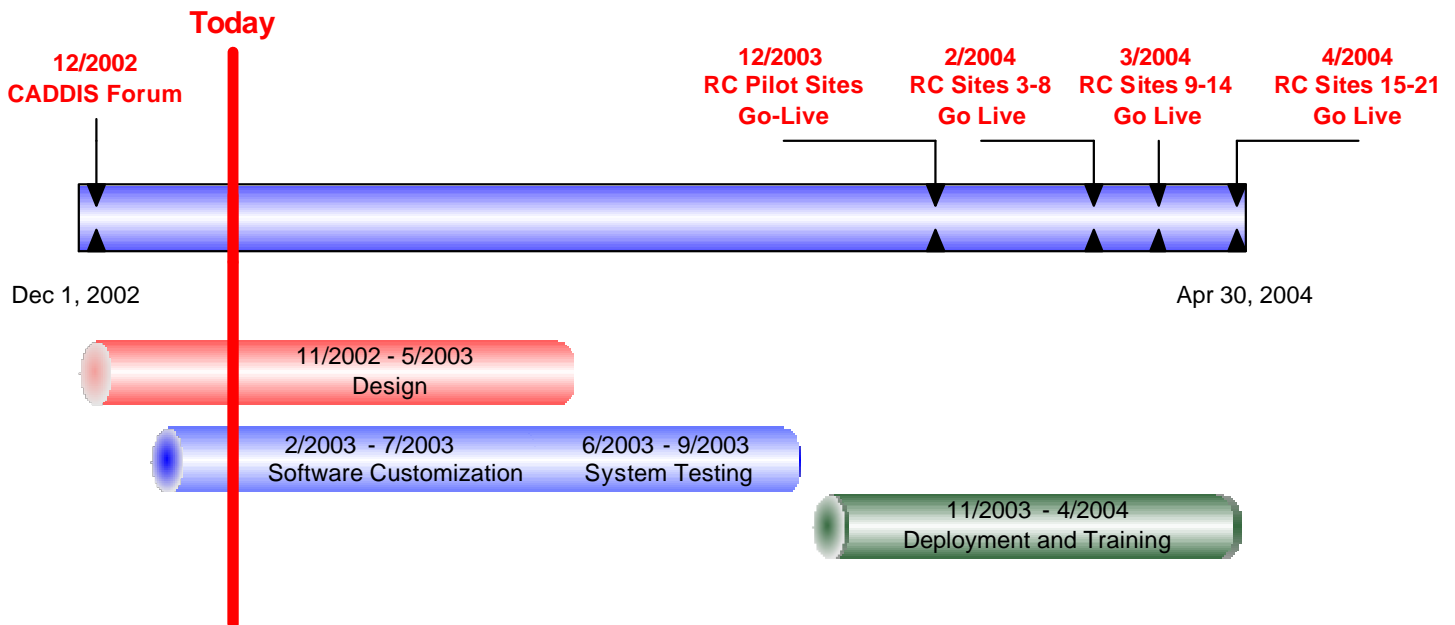
There are currently 9 design groups which include over 100 DDS/regional center Subject Matter Experts (SMEs). The System Design process is illustrated below:

6.Handoff to CADDIS Development

1.CADDIS Team Develops CIL

System Design Cycle

4.DDS/RC Reviews DIL/FIL

5.DDS/RC Approves Functional Spec. (CIL/DIL/FIL)

2.DDS/RC Reviews CIL

3.CADDIS Team Develops DIL/FIL

Thanks to all of the SMEs for their time commitment in working on the System Design!

Revised Project Schedule

The CADDIS Project Schedule has been revised to ensure adequate time was allowed for regional center and DDS input into the System Design Process. As detailed below, CADDIS go-live dates have been revised as well. We are confident that this additional development time will ensure vital input to the system design process is received.

Today

12/2002 CADDIS Forum

12/2003 RC Pilot Sites Go-Live

2/2004 RC Sites 3-8 Go Live

3/2004 RC Sites 9-14 Go Live

4/2004 RC Sites 15-21 Go Live

Dec 1, 2002

Apr 30, 2004

11/2002 - 5/2003
Design

2/2003 - 7/2003
Software Customization

6/2003 - 9/2003
System Testing

11/2003 - 4/2004
Deployment and Training

CADDIS Training Information

Many of you have been asking what type of training materials will be available for regional centers during CADDIS User Training. The CADDIS Training Team is developing a variety of guides and manuals that will be distributed to regional center participants who attend Certified CADDIS Training. The Certified CADDIS Trainers (CCTs) will then use this material for user training at their regional center. The training materials include:

Participant Guide
The Participant Guide will contain all materials needed to learn the CADDIS Application, including an outline for each course with sections organized by CADDIS Module. Each module will include an overview, lesson objectives, lessons, exercises, and lesson reviews.

Instructor Guide
The Instructor Guide will be used by the CCTs to assist them in user classroom training. It will include all materials in the Participant Guide; instructor demonstration materials; solutions to lesson exercises; presentation skills materials; classroom logistics materials; and Training Environment instructions, including user IDs and passwords. The Training Environment will be hosted by DDS and will be a replica of the CADDIS Production Environment. It will include all data/information needed to complete exercises during training in an environment similar to the actual CADDIS Application. Regional Centers will receive access to this environment during user training so that participants can complete all module exercises in this "real-life" CADDIS Application.

CADDIS User Manual
The CADDIS User Manual will include screen prints and descriptions of CADDIS functionality.

CADDIS Help Desk Manual and CADDIS Systems Operation Manual
The CADDIS Help Desk Manual and CADDIS Systems Operation Manual will include system administration and troubleshooting information. They will be used by Deloitte Consulting during Technical Training for Regional Centers' technical and Help Desk staff.

DDS is working with each Regional Center to establish a CADDIS Training Contact for ongoing communication and scheduling for CADDIS training.

If you have any additional questions about the CADDIS Training program, you can email Tamara Wheeler, DDS HQ Training Officer, at twheeler@dds.ca.gov, or call her at (916) 654-1855.

CADDIS CCT Training Schedule

Wave	Regional Center	Dates	Location
Pilot	Inland, Valley Mountain	Nov 2003	To Be Determined
Wave 1	Redwood Coast, Far Northern, Alta, North Bay,	Jan 2004	Sacramento
Wave 1	Central Valley, Kern, San Andreas	Jan 2004	Fresno
Wave 2	East Bay, Golden Gate	Feb 2004	San Francisco
Wave 2	Tri-Counties, N. LA County, Westside, San Gabriel/Pomona, San Diego,	Feb 2004	Los Angeles (1)
Wave 3	Orange, South Central, Lanterman, E. Los Angeles, Harbor	Mar 2004	Los Angeles (2)

New to the CADDIS Team

Judi Maus will be working on the CADDIS Help Desk along with Terry, Barbara, and Kelly. She has been with DDS for 12 years, and has been with the Information Services Division for the last four years working with some of you on data clean up. Judi is looking forward to CADDIS, and providing support for your new system.

Kelly Kohlbaker is the newest addition to the CADDIS HelpDesk at DDS. Kelley came on board at DDS on December 1st, 2002 and will be working with Terry, Barbara, and Judy. She looks forward to working with and providing assistance to each of you in the years to come.

Bob Copren joins the CADDIS team as DDS's Database Administrator, reinstating from California State service retirement. Previously, Bob led Database Support at the Health and Human Services Agency Data Center from 1980 to 1994 and was the State's technical manager for the rollout of Interim Statewide Automatic Welfare System to 35 California counties from 1994 to 1998. Bob has managed and worked on IT projects and systems for nearly 30 years, mostly in design, implementation and support of databases for information systems in the health and human services sectors.

Darlene Crawford is the CADDIS Project Training Lead. Darlene has over 12 years of experience designing, developing, and delivering training to various clients. Her past projects include managing training projects for both non-profit and government computer system implementations. Darlene has also worked with teams in the development of system design and change management deliverables. Darlene is responsible for developing the training for CADDIS and is also currently assisting in the system design effort. Darlene has a Master's Degree in Adult Training and Development from CSU, Chico.

Marcy McKnight is a member of the design team, working within the Fiscal Accounting and Trust Management functional areas. She is working with Subject Matter Experts to develop design specifications for ShareCare Accounting features such as Operations Vendor, Purchase Orders, Invoices, Check Production and Reports. She has been with The Echo Group for almost 20 years and through that time has gained extensive system design experience in her role as Product Manager of Accounting, Clinical and Billing software. As Product Manager, her responsibilities have included taking the idea of a product from the requirements and design phase through development, quality assurance and documentation into the hands of users.

Evgueni Khanine is a Database Administrator with the CADDIS Project responsible for the production database and datamart. Evgueni received his Bachelor's Degree in Mathematics/Economics from Moscow State University and has been enrolled in the PhD program at the University of Minnesota. Evgueni has been working in the IT industry since mid-80s and was employed as a programmer and Oracle DBA since 1989.

Amy Bank works for the Echo Management Group as a Product Manager for ShareCare and is working on the CADDIS Project in the role of Business Analyst. Amy is involved in the specification design process and has been working very closely with the other design team members to determine how to best enhance ShareCare to meet CADDIS requirements. She has been busy attending Subject Matter Expert (SME) meetings, creating specifications and answering questions that individuals have about ShareCare. Amy received her degree from the University of Michigan.

Ron Harris is currently a Functional Lead for the CADDIS fiscal system design. Prior to CADDIS, Ron has worked with Deloitte Consulting on several projects to develop a web-based application and eligibility screening system, known as Health-e-App, for public health coverage programs for California, Arizona and Indiana. Ron has also worked on projects for Arizona's Department of Economic Security to implement a Managed Care software solution. Ron has earned a BA degree in International Business from California State University, Fullerton.

Matt Nunan is the CADDIS Logical Data Model Lead and is also assisting in the Data Mapping, Data Reconciliation and Data Conversion efforts. Matt is in his fourth year with Deloitte Consulting, and brings strong data modeling skills and extensive data conversion experience to the CADDIS Team. Born and raised in Oregon, Matt graduated from Oregon State University with an Industrial Engineering degree. Since then, he has worked on projects in various industries and locations along the West Coast (Seattle, San Francisco, San Jose, Los Angeles) and now resides in Los Angeles.

Geoffrey A. Greig has more than 10 years of experience in public sector technology planning and implementation. His areas of expertise include information systems analysis and design, strategic planning, implementation planning, project management and project oversight/IV&V. Geoff graduated *cum laude* with a BS degree in economics and system science from the UCLA. He earned an MBA from The Anderson School at UCLA and he holds Project Management Professional (PMP) certification from the Project Management Institute.

Jim Obermaier has more than 11 years of experience in IT consulting, strategic planning, implementation planning, policy analysis, and statistical analysis in state government and education organizations. His areas of expertise include business process re-engineering, IT systems analysis, organizational and program assessment, change management and communications planning. Jim earned a BS degree in journalism from the University of Kansas. He also earned a master of public administration degree from the University of Southern California.